





Country Profile 2020





French President since May 2017: **Emmanuel Macron**
“La République En Marche” – Centrist and social-liberal political party
Next election in April 2022



France is the 7th largest economy in the world (source Statistics Times)



GDP: **\$2.603 trillion** - GDP Growth: **-0,10% in 2020** vs. -1,5% in 2019 (Trading economics)

GDP per capita: **\$40,560** in 2020 vs 44,235 in 2019 (Trading economics)

Gross Disposable Income: -0,85% in 2020 vs **+1.5%** in 2019 (Trading economics)



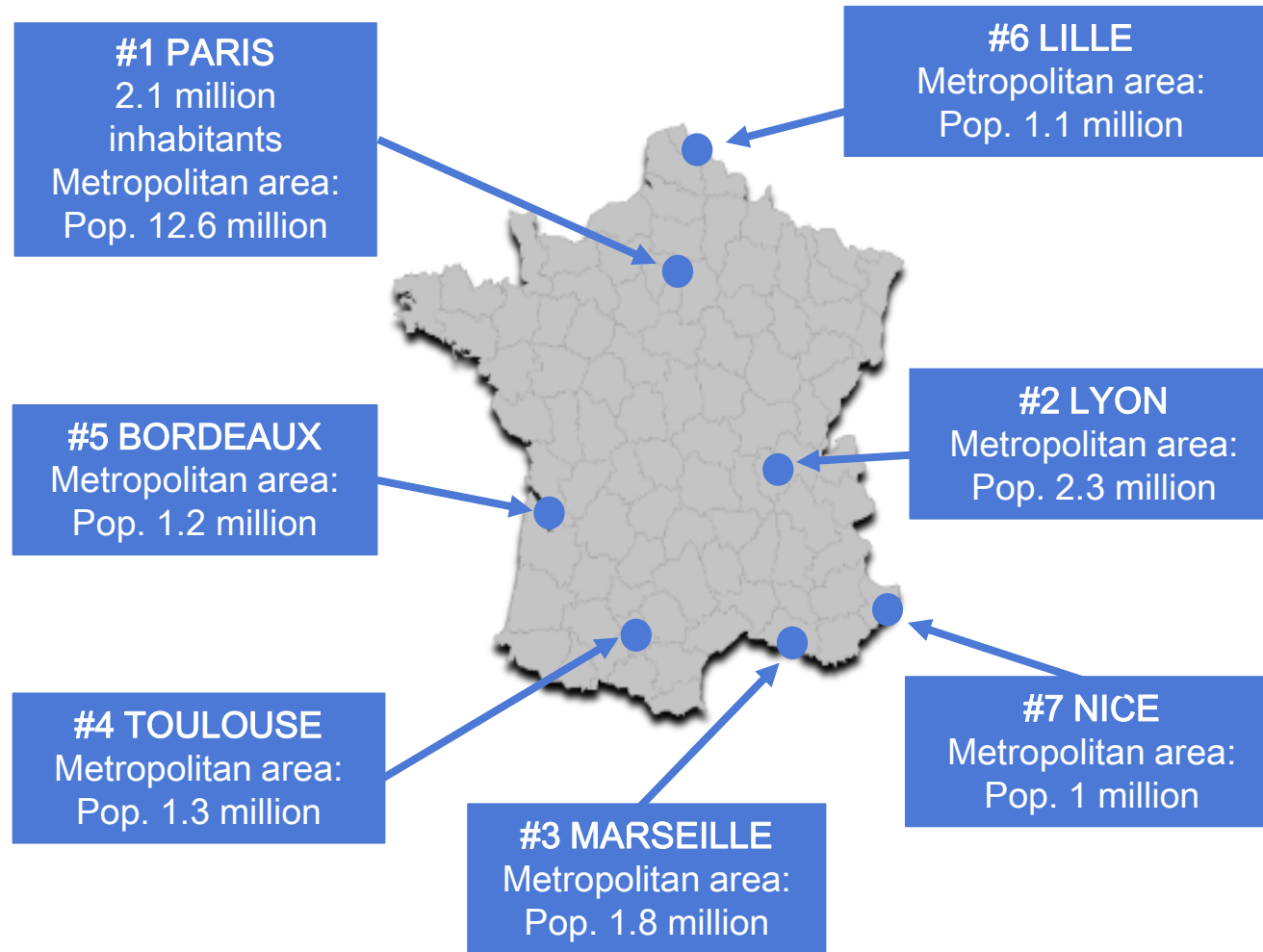
Unemployment rate: **8% in 2020** vs. 8,4% in 2019 (Insee)



A Favorable business climate since 2010 decelerated by the Covid-19

Inflation rate: **0,5% in 2020** vs 1,3% in 2019 (1,4% 2021 Forecast) (Trading economics)





#1 PARIS

2.1 million
inhabitants

Metropolitan area:
Pop. 12.6 million

#6 LILLE

Metropolitan area:
Pop. 1.1 million

#2 LYON

Metropolitan area:
Pop. 2.3 million

#5 BORDEAUX

Metropolitan area:
Pop. 1.2 million

#4 TOULOUSE

Metropolitan area:
Pop. 1.3 million

#3 MARSEILLE

Metropolitan area:
Pop. 1.8 million

#7 NICE

Metropolitan area:
Pop. 1 million

**Source Insee*





French Travelers Trends





Despite of the pandemic restrictions, 60% of the French went on holidays in 2020 (-8pts vs 2019).

Among them =>

- 33% had a short trip (1-3 nights) with a paid lodging
- 25% had a long trip (4 nights +) with a paid accommodation
- 30% had a long-stay at relatives' accommodations (free)

2020 destinations:

- 90% stayed in France (+10pts)
- 20% traveled out of France (Dom-Tom included, -32 pts)



Average Budget -30% vs 2019 (1530 euros vs 2190 in 2019)

In 2021, 57% of French express a vital need to travel

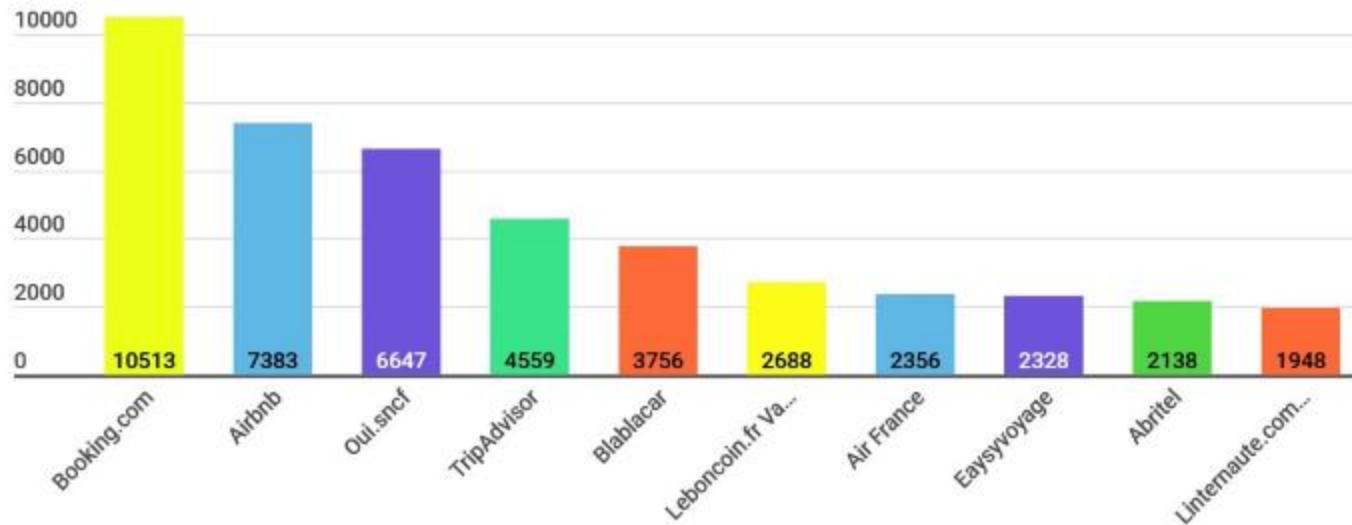
French travel twice a year (vs once a year for other UE countries)

*Source [Le Figaro.fr](https://www.lefigaro.fr) & [InfoTravel.fr](https://www.infotravel.fr)



Top 20 websites for travel bookings in 2021

Million unique visitors in April



E-commerce:

In 2020, Travel-Tourism sites were hit hard by the effects of traffic restrictions imposed by the health crisis. Despite a slight improvement in the situation during the summer, the sector was down by -47% compared to 2019.

- 81% of French travelers in 2020 were “E-tourists” and prepared their trips online
- 60% of French travelers booked their trips online

*Source [L'Echo Touristique](#) & [Air-Journal](#)



2021 trends / Decision making criteria

- **Travel As soon as possible** – not only in France
- **Nature is a priority** - Less populated places located outside the cities will be the most popular destinations
- **Health Security, a main criteria** – French travelers (77%) will take more precautions to protect themselves from the coronavirus - 40% will favor airlines, airports and hotels with higher health and safety standards
- **The democratization of contactless & mobile apps** - contactless will speed up in airports, transport and accommodation. The technology that makes it easy, from check-in to payment, gives travelers confidence. Having a mobile app that delivers health alerts, for example in the event of new restrictions, is also popular with travelers.
- **Using a travel agent** - 40% of international travelers expect their travel agency to be there to resolve issues and provide more recommendations
- **Flexibility, a key selling point** - Around 46% of travelers consider reimbursement as essential for their next trip, according to a Booking.com study published in 2020



2021 trends / Decision making criteria

- **Last minute bookings** - All "stop and go" announcements related to the pandemic throughout 2020 encouraged travelers to make up their minds at the last moment. Even regarding long haul destinations. This is one of the major constraints that travel stakeholders will have to contend with.
- **Responsible travel** - 63% of travelers expect the industry to provide more sustainable options (environment, benefits for locals, transportation)
- **Nomad Workers** - The pandemic has accelerated the rise of teleworking. Some destinations have created special package for the nomad workers. As example, Barbados has developed a "digital nomad" visa, which allows you to work from paradise for a year.

**Source [L'Echo Touristique](#)*

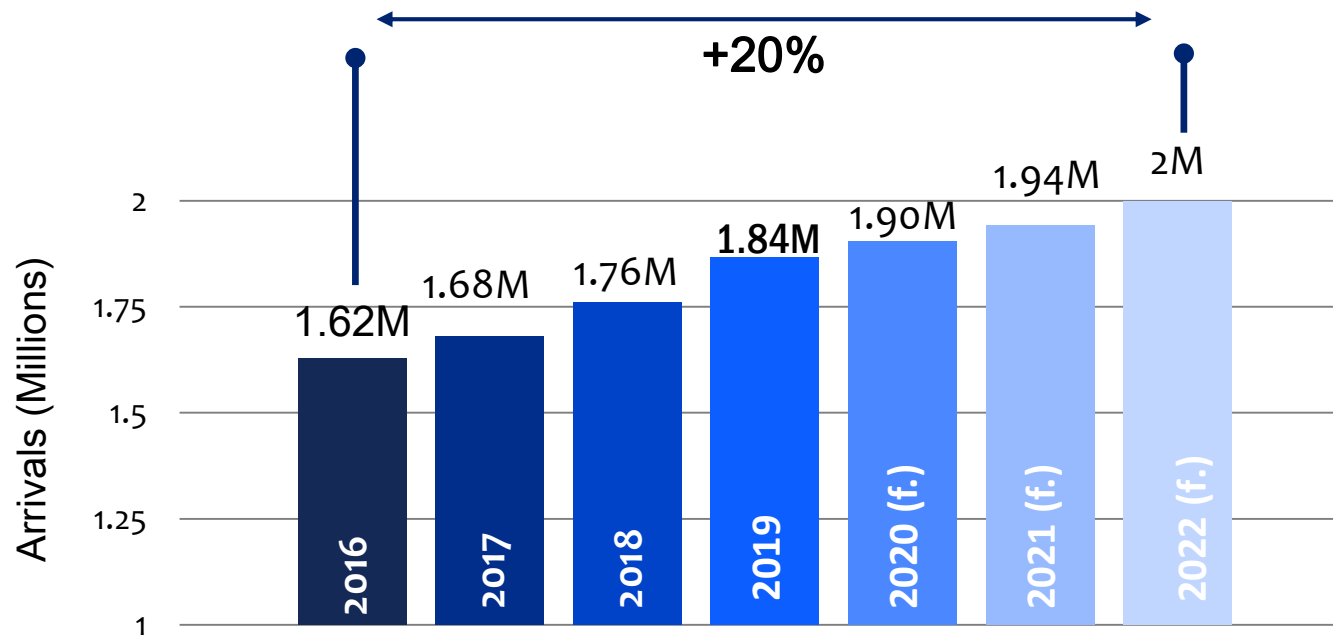




French Travelers to the U.S



Number of visitors and forecast (Pre-Pandemic)



2018 – France is ranked **third** among European countries in terms of visitors behind UK and Germany

2019 – **4,3% increase**, putting France in the Top 10 of the emitting countries

2020/2022 Forecast –
Estimations done before the pandemic, up to date forecast
N/A

Source: U.S. Department of Commerce, ITA, National Travel & Tourism Office



Pre-Pandemic Visitors' Profile



1.84 million French travelers to the U.S. in 2019 (+4,3% vs 2018), **66%** of them were **repeaters**



Average number of states visited: **1.6**



Average length of trip: **15.9 nights**



Average age: **41 years old**



Average exp.: **\$3,487**

Top travel motivators

56% Local lifestyle

54% Cultural/Historical Attractions

40% Urban attractions

43% Dining/Gastronomy

37% Ecotourism/nature

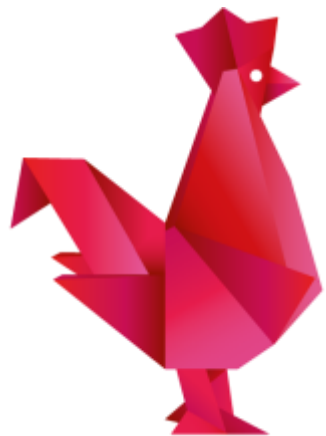
Source: U.S. Department of Commerce, ITA, National Travel & Tourism Office





French Travelers to Arizona





Arizona welcomed 7,700 French visitors in
2020 (-93.3% vs 2019)



Main flights from Paris

Aer Lingus: Los Angeles, San Francisco

France-KLM: Los Angeles, San Francisco, Denver (NEW), Houston

Air Tahiti Nui: Los Angeles (suspended)

Air Canada: Montreal, Toronto

American Airlines: Chicago, Dallas, Miami, NYC, Philadelphia

British Airways: Phoenix (via London)

Condor: Phoenix (via Frankfurt - suspended)

Delta Air Lines: Atlanta, Detroit, New York, Minneapolis, Denver (shared with AF)

Icelandair: Denver, Portland, Chicago, Minneapolis, NYC, Orlando

United: Chicago, Washington, NYC, San Francisco

Main port of entry: Los Angeles





France – FY21 Major Achievements & Activities



Express Conseil PR Activities FY21



Creation and distribution of e-newsletters and press releases to inspire Arizona trips in the future and to maintain communication with French media.



Coordination of media trips to give the press and influencers the opportunity to produce unique stories and explore lesser-known regions of Arizona. (Placed on hold in FY21)



Interaction and engagement with key audiences on AOT's French Facebook account and AOT video content sharing to inspire potential travelers.



Express Conseil is a member of the Visit USA Committee/France on behalf of AOT.



Express Conseil organizes media missions in France for AOT. (Placed on hold in FY21)



Media Newsletters & Press Releases

Creation, distribution and follow-up of 10 newsletters
and 1 press release in FY21:

- July 2020 “Outdoor Adventures in AZ” newsletter
- September 2020 “2019 French Visitors Numbers” press release
- October 2020 “Cowboy & Western” newsletter
- November 2020 “Arizona Road Trips with Unique Roadside Attractions” newsletter
- December 2020 “Sun or Snow” newsletter
- January 2021 “What’s up in AZ” newsletter
- February 2021 “Arizona: Year-Round Birding and Spring Wildflowers” newsletter
- March 2021 “Vintage AZ” newsletter
- April 2021 “Small Town Summer Fun in AZ” newsletter
- May 2021 “Camping Guide” newsletter
- June 2021 “What’s new in AZ” newsletter



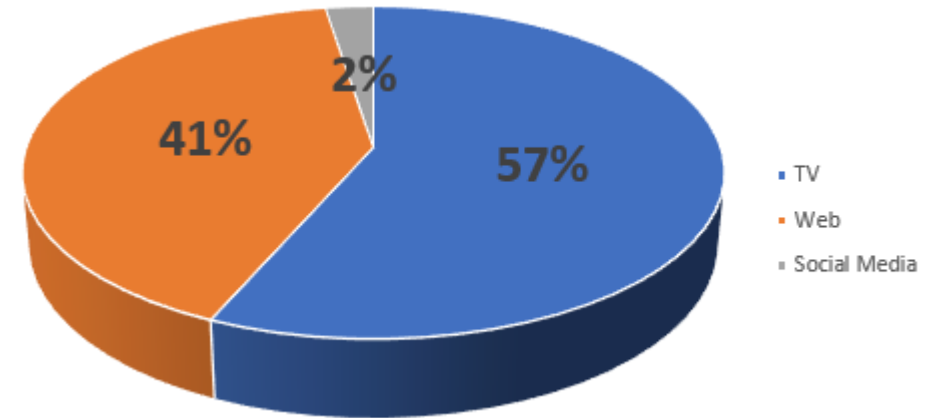
L'histoire des chemins de fer, des prospecteurs, des outlaws et des cow-boys a fait de l'Arizona un état emblématique de l'Ouest américain. Comme en témoigne les exploits de Wyatt Earp, les légendes de l'Ouest continuent de fasciner. Bon nombre de western hollywoodiens – « La Chevauchée fantastique » ou « Il était une fois dans l'Ouest », pour n'en nommer que quelques-uns – ont plantés leurs décors dans le Grand Canyon State. Mais pour les Arizoniens, le Far West n'est pas seulement qu'un passé lointain devenu mythique avec le temps, c'est avant tout un héritage qui a été préservé et qui continue de prospérer.



FY21 Media Results

\$229,849*

Total generated media coverage



FY21 Samples of Media Coverage

TV5MONDE

france.tv



Aug. 2020 (TV5 Monde) &
November 2020
(France2)| « Sierra Vista»
06:23 min video for Pays
et Marchés du Monde TV
series: \$133,500

**L'Hôtellerie
Restauration**



© Ambiente Arizona
Le resort Ambiente en Arizona s'insère en pleine nature.

Oct. 2020| Web article
« Ambiente Sedona
opening» article: \$1000



Nov. 2020| “XXI
century’s Cowboys”
article: \$6,500



Parcs nationaux de l'Ouest américain : nos 10 coups de cœur entre déserts et paradis Terrestre



Dec. 2020 & Feb. 2021|
Web «Top 10 of
Southwest parcs» and
« Tips to visit a National
Park » articles: \$14,500
each

FORMATION

Une nouvelle série de webinaires pour se perfectionner sur le tourisme durable

Publié par Brice Lahaye le : 14.12.2020 Dernière Mise à jour : 14.12.2020



L'agence Express Conseil annonce l'organisation d'une série de formations en ligne consacrées au tourisme durable, avec un premier épisode, le 18 décembre, dédié à l'hébergement éco-responsable.

Dec. 2020| Webinar
announcement
«Responsible lodging»
featuring AOT as guest
article: \$1,950

Tourisme responsable : une nouvelle vision du voyage

Valérie Sasportas • Le 31 janvier 2021



Jan. 2021| “Responsible
Tourism: a new vision of
travel” article as results of EC
webinar in December.
Mentions: Kim Todd, AOT,
Leave No Trace, Ambiente
Sedona Landscape Hotel:
\$8,450

FY21 Postponed Press Trips



Echappées Belles (6 person TV crew)

- *Echappées Belles*: #1 TV travel program in France – 900,000 average viewers after the 1st broadcast and up to 1.4 million viewers after 2nd broadcast/rerun (program's audience)
- Local support and itinerary follow-up to create a 90-minute Travel TV program dedicated to Arizona



Adrien Gombeaud (journalist) & Eric Martin (photograph)

- *Le Figaro Magazine*, 1st High-End French Weekly Magazine – 339,546 copies / 1,880,000 readers
- “Desert and architecture “ thematic trip. Accommodation & activities support in Phoenix, Tucson, Sedona, Flagstaff and Page areas



Jean-François Guggenheim (journalist/photographer)

- *L'Officiel*, High-end Fashion and Lifestyle Magazine – 75,000 copies / 258,000 readers / Web : 1 million-page views / month, 300,000 unique visitors / month
- Individual press trip: **AZ wine trails thematic trip** in partnership with United Airlines (complimentary flights)



Laurie Medina (TV documentary creator)

- *Voyages Vert Vous*, New travel & sustainability TV program broadcasted via TV5 Monde (International French TV) and France2 (National TV channel)
- Northern AZ support to shoot a **Dark Sky** episode



French Facebook

FY21 Facebook frequency: **2 posts / week**

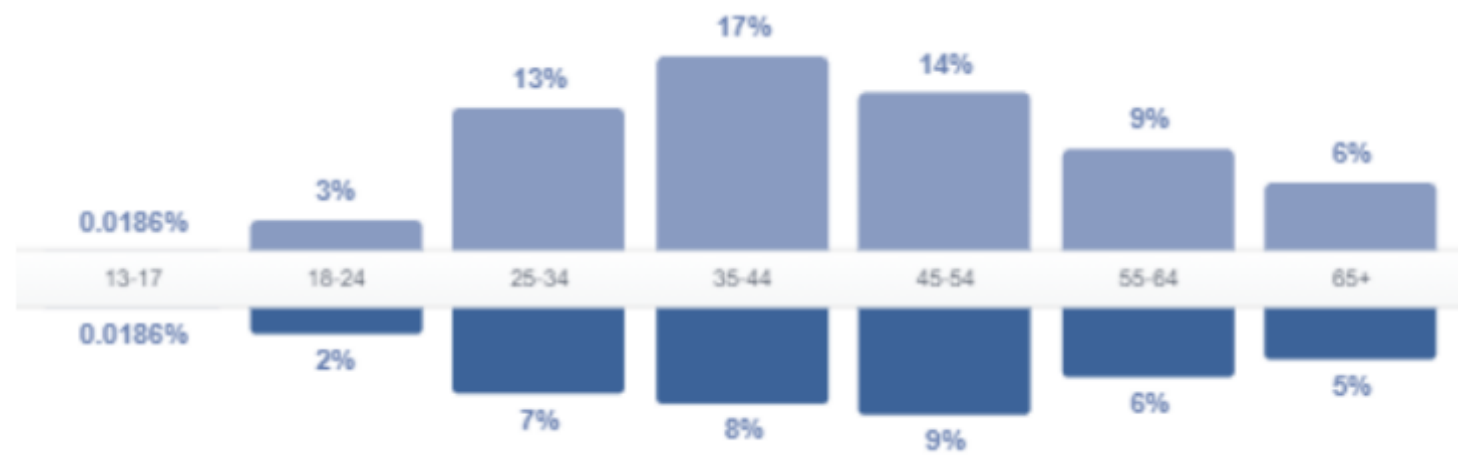
Fans demographic

Women

 **61%**
Your Fans

Men

 **38%**
Your Fans

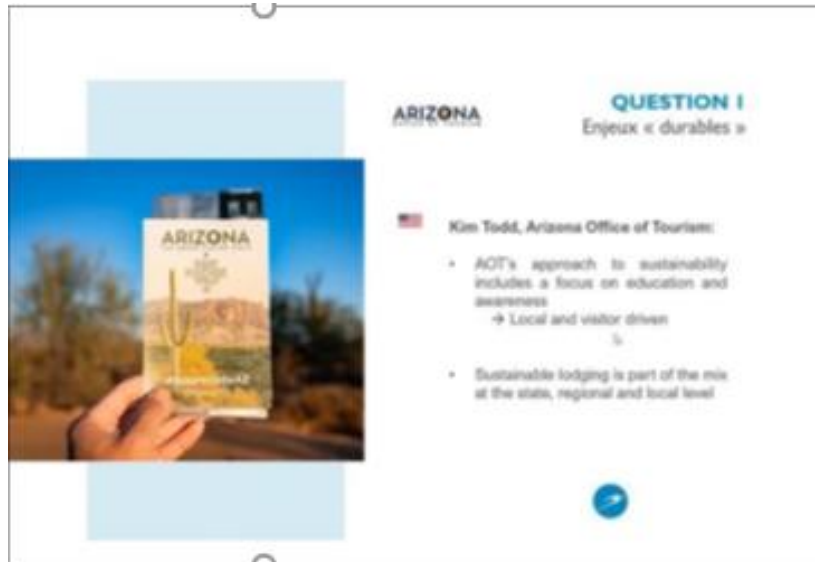


Facebook – FY21 Metrics

	FY19	FY20	FY21	Evolution vs N-1
Page likes (year end)	5,131	5,282	5,370	+1,6%
Followers (year end)	4,913	5,077	5,178	+1,9%
Total Reach of the page	N/A	85,649	45,797	-46%
Total Engagement (Interactions + clicks)	3,639	6,290	3,001	-52%
Videos / minutes viewed	494	773	1,329	+71%
Average engagement rate	6%	9,2%	6,5%	-2,7 pts



Responsible Travel Webinar



Dec 15th - Express Conseil organized a digital event about Sustainable Tourism, as it is developing in France. Express Conseil launched the 1st episode “Sustainable Lodging” on Tuesday December 15th with AOT (Kim Todd) as one of the main speakers. 263 people (travel professionals, tourism sector professionals and journalists) confirmed their participation in before the webinar. During the presentation, the number of connected participants reached up to 145. Most participants stayed on the webinar until the very last question of the Q&A session. Partners assets (presentation, webinar replay, itineraries, videos...), including AOT, were sent to the 263 webinar subscribers

AZ mentions during the webinar: AOT, Arizona Green Lodging Program, ADEQ, AzLTa, Keep Nature Wild campaign, Leave No Trace, Appreciate AZ campaign, Ambiente Landscape Hotel Sedona, Raven's Nest Nature Sanctuary. Additional Assets shared after the webinar: AOT website and social tags, AOT official Guide, Multi-state itineraries, pictures, Kim Todd's contact.



Visit USA Advertising



AOT had a complimentary banner which was featured on both Visit USA [homepage](#) and in an [interview page](#), running from February 2nd and April 2nd, 2021.

> *Stats: 3,000 displays and 31 clicks to CTA link (<https://www.visitarizona.com/rediscover-arizona/>)*



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Thank You

